



Preferred Partner Energy Calculator



Powered by
LOCKHEED MARTIN 

Preferred Partner Energy Calculator (PPEC) User Manual

Lockheed Martin Corporation
Version 1.0, November 2014

© 2014 Lockheed Martin Corporation

Table of Contents

1. Introduction	1
2. Project Overview.....	2
2.1 Project Roles	2
3. Starting The Preferred Partner Energy Calculator	3
4. Project List Screen.....	4
4.1 Project List Screen Buttons	4
4.2 Project List	6
4.3 Project Summary.....	6
4.4 Project Status Tracker	7
4.5 Project List Screen – Offline	9
5. Project Window	10
5.1 Project Information Tab.....	11
5.2 Building Information Tab	14
5.3 Preliminary Assessment Tab	16
5.4 Approval Process.....	20
5.5 As Installed Tab.....	21
5.6 Report Tab	23
6. References	24

List of Figures

Figure 1 - Project Lifecycle	2
Figure 2 - Project List Screen.....	3
Figure 3 - Project Screen Buttons	4
Figure 4 - Blank Project	4
Figure 5 - Checked Out Project	5
Figure 6 - Project List	6
Figure 7 - Project Summary	7
Figure 8 - Preliminary Assessment: In Work	7
Figure 9 - Preliminary Assessment: Submitted	8
Figure 10 - Preliminary Assessment: Rework.....	8
Figure 11 - As Installed: In-work	8
Figure 12 - As Installed: Submitted	9
Figure 13 - As Installed: Rework	9
Figure 14 - As Installed: Approved	9
Figure 15 - Required Fields	10
Figure 16 - Resources Window	11
Figure 17 - Custom Rate.....	11
Figure 18 - Favorite Fixture.....	12
Figure 19 - Fixture Filter.....	13
Figure 20 - Favorites List	13
Figure 21 - Syncing Your Favorites.....	13
Figure 22 - Custom Fixture.....	14
Figure 23 - Building Information Tab	15
Figure 24 - New Schedule	15
Figure 25 - Preliminary Assessment Tab	16
Figure 26 - Add Room	17
Figure 27 - Room Frame	17
Figure 28 - Collapsed Room List.....	18
Figure 29 - Multiple Measures	19
Figure 30 - Approver Buttons.....	Error! Bookmark not defined.
Figure 31 - Custom Measure Code.....	Error! Bookmark not defined.
Figure 32 - Approval Toggle	20
Figure 33 - Approver Edits	20
Figure 34 - Added Room	21
Figure 35 - Deleted Measure	21
Figure 36 - As Installed Tab - Cannot Start.....	22
Figure 37 - As Installed Changes	22
Figure 38 - Report Tab	23

1. Introduction

The Preferred Partner Energy Calculator (PPEC) application is used by the Preferred Partner Network (PPN) and energy efficiency program administrators to calculate estimated energy savings from upgrading existing equipment in customer facilities.

The PPEC contains a comprehensive list of light fixtures, room types, and controls to calculate utility incentive payments, energy savings, and payback periods of upgraded equipment. Through the PPEC, the PPN can define buildings, rooms, operating schedules, and utility rates to determine the best combination of building upgrades to maximize the savings that a customer can see for their facilities as well as the incentive associated with that project.

The PPEC is capable of operating either online or offline to give the PPN user maximum flexibility in assessing customer locations and facilities. In the offline mode, all changes to projects are tracked and later uploaded to the cloud for sharing with other personnel within the PPN's own company. In both modes, the PPEC tracks a PPN's favorite lighting fixtures for use across multiple projects and syncs them to the cloud for easy access.

The PPEC can export the list of energy conservation measures of a project to a .PDF document. The PPEC also tracks updates to the project showing what was originally submitted, what was approved, and what was actually installed during the execution of the project.

The following sections describe how to complete basic tasks including creating a project, entering measures, and viewing results.

2. Project Overview

A project is a way for a utility customer to make improvements to their building, estimate the savings from their utility bill, and also participate in utility sponsored incentive programs. The graphic below (Figure 1) shows the process and lifecycle of a project.

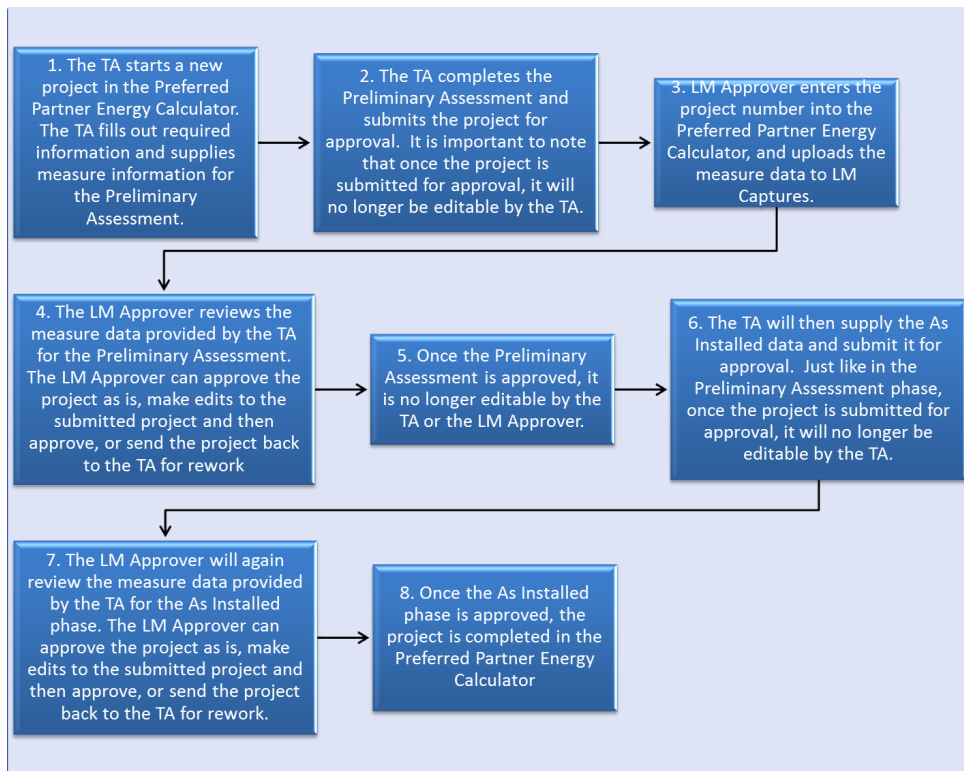


Figure 1 - Project Lifecycle

2.1 PPN User Role

2.1.1 Preferred Partner Network Role

The PPN can create new projects, edit existing projects not yet submitted, submit projects, and delete projects that haven't yet been submitted for approval. A PPN can only see and edit projects that have been created by other users within their company with the same PPN. It is important to note that once a project has been submitted for approval, a PPN can no longer edit the project.

David Gajewski 11/25/2014 12:59 PM

Comment [1]: #6 should say input rather than supply

3. Starting The Preferred Partner Energy Calculator

To start the Preferred Partner Energy Calculator application, double click on the desktop icon. If your computer is connected to the internet, the application starts in online mode and the PPEC will ask for your username and password. If your computer is not connected to the internet, the application starts in offline mode.

After starting in either online or offline mode, you'll be taken to the project list screen (Figure 2).

The screenshot shows the 'Projects' screen of the Preferred Partner Energy Calculator. At the top, there's a search bar and a 'Search' button. Below that are buttons for 'New', 'Open', 'Check Out', 'Check In', 'Discard Check Out', and 'Delete'. A 'Sort' dropdown is set to 'Last Update' with 'Ascending' and 'Descending' options. The main table has columns: Number, Name, Phase, Last Update, Submission Code, Checked Out To, and Downloaded. One project is listed: 'ABC Lighting Upgr...' with phase 'Preliminary Assessme...' and last update 'Nov 17, 2014'. Below the table is a 'Project Summary' section for 'ABC Lighting Upgrade'. It lists details for Company (ABC Manufacturing), Phase (Preliminary Assessment), PPN (Jason Smith), Last Updated (Nov 17, 2014), Building (ABC Manuf. Warehouse), and various savings metrics. At the bottom, there's a status bar with buttons for 'Pre-Asmt: In-work', 'Submitted', 'Rework', 'Approved', 'As-Inst: In-work', 'Submitted', 'Rework', and 'Approved'.

Number	Name	Phase	Last Update	Submission Code	Checked Out To	Downloaded
	ABC Lighting Upgr...	Preliminary Assessme...	Nov 17, 2014			

Project Summary

ABC Lighting Upgrade

Company: ABC Manufacturing
Phase: Preliminary Assessment
PPN: Jason Smith 719-258-9871 jason.smith@webmail.com
Last Updated: Nov 17, 2014
Building: ABC Manuf. Warehouse
1334 Lake Ave
Suite 120
Pueblo, CO 81004
Company POC: Dave Romer 719-544-3988 dave.romer@mail.com
Building POC: Dave Romer 719-544-3988 dave.romer@mail.com

Number of Rooms: 0
Existing Fixtures: 0
Proposed Fixtures: 0
Project Cost: \$0.00
Total Incentive: \$0.00
kW Savings: 0.00
Annual kWh Savings: 0.00
Annual Utility Bill Savings: \$0.00
Simple Payback Period:

Pre-Asmt: In-work Submitted Rework Approved As-Inst: In-work Submitted Rework Approved

Figure 2 - Project List Screen

From the project list screen you can see the projects that are currently in work, those that have been downloaded to your machine, and (for online mode only) those that are on the server. You can create new projects and open projects that have been checked out to you. The project list screen and the individual project windows will have different functionality in online and offline mode. Differences in functionality will be pointed out in applicable sections.

4. Project List Screen

The project list screen is your starting point for the PPEC. From the project list screen you will be shown a list of the projects that are available to you. As a PPN, you are only able to see projects that are being worked on by your company.

The project list screen is divided into several sections. Each functionality is explained below.

4.1 Project List Screen Buttons

The top of the screen contains a row buttons to create a new project, open an existing project, check out and check in an existing project, Discard(release) a checked out project, and delete a project.

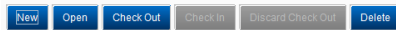
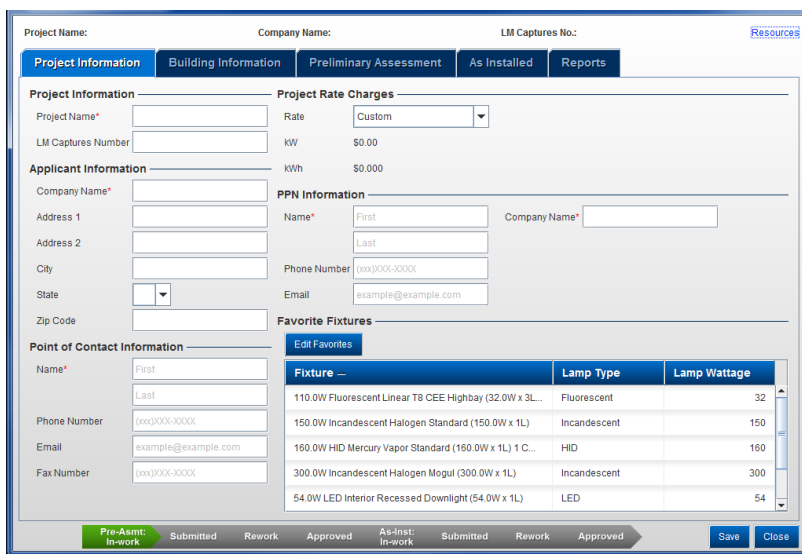


Figure 3 - Project Screen Buttons

4.1.1 Create a New Project

Pressing the new project button opens a blank project window (Figure 4).



Fixture	Lamp Type	Lamp Wattage
110.0W Fluorescent Linear T8 CEE Highbay (32.0W x 3L...	Fluorescent	32
150.0W Incandescent Halogen Standard (150.0W x 1L)	Incandescent	150
160.0W HID Mercury Vapor Standard (160.0W x 1L) 1 C...	HID	160
300.0W Incandescent Halogen Mogul (300.0W x 1L)	Incandescent	300
54.0W LED Interior Recessed Downlight (54.0W x 1L)	LED	54

Figure 4 - Blank Project

From here you can populate the associated fields with project specific information. You can save the project or close the window without saving. The individual project window tabs and screens will be detailed in following sections. The new project will not be visible to other users until you have checked it in.

4.1.2 Open a Project

You can open an existing project by double clicking it from the project list, right clicking and choosing open, or highlighting the project and clicking the open button above the list. If the project isn't checked out by another user, it will be checked out to you. With the project checked out you can edit the project and save the changes. It is important to note that if the project is checked out to a different user, or if it has been submitted for approval, it will be opened in read only mode. In read only mode you can view all of the information in the project, but are not able to change it.

While the project is checked out to you other users will not be able to make any changes. Any updates that you've made will not be viewable by other users until the project is checked in.

4.1.3 Check Out a Project

You are able to check out a project without opening it by highlighting a project and clicking the check-out button above the list. Checking out the project will download a local copy of the project to your computer and prevent other users from editing the project online. The local copy enables you to edit the project when you are offline and unable to connect to the Internet. In the project list, a checkmark will be present indicating the project is downloaded on your machine and ready to be edited online or offline.

Delete

Sort: Last Update ▼ ☐ Ascending ☒ Descending


Last Update ▼	Submission Code	Checked Out To	Downloaded
Nov 17, 2014		romero_ta	
Nov 17, 2014	SUC1		

Figure 5 - Checked Out Project

Again, when a project is checked out it will not be editable to other users and they will only be able to view the project in read only mode.

When you submit a project for approval, it will automatically be checked in and be locked from editing by all PPNS.

4.1.4 Check In a Project

When you check in a project, your changes are uploaded to the server and are viewable by other users. If you are checking in a new project, it will then be visible to other users. If a project is checked in, the local copy (on your computer) is removed and will not be accessible in offline mode.

Note: It is important to remember to check out a project prior to going offline to a customer site.

4.1.5 Discard a Checkout

You can discard a checkout if you don't want to upload the changes you've made to your project. When you discard your checkout, the project will be shown as checked in and any changes that you've made will be lost.

4.1.6 Delete a Project

You can delete a project that hasn't been submitted during the Preliminary Assessment phase. Once a project has been submitted, it can only be deleted by an EnergyRight program administrator. It will be removed from the project list and will no longer exist on the server. Deleted projects cannot be recovered.

4.2 Project List

The Project List shows a list of all projects that have either been downloaded to your computer, or projects that other users from your company created that are located on the server. You can only edit a project that is downloaded to your machine and checked out. When a project is checked out, it will not be editable by anyone but you until you check it back in. The project list will show the username of the person that has the project checked out.

Number	Name	Phase	Last Update ↗	Submission Code	Checked Out To	Downloaded
	Tom's Hardware	Preliminary Assessme...	Nov 17, 2014			
	Stadium Upgrade	Preliminary Assessme...	Nov 17, 2014		romero_ta	✓
	ABC Lighting Upgr...	Preliminary Assessme...	Nov 17, 2014	SUC1		

Figure 6 - Project List

The project list will also show if the checked out project has been downloaded to your machine. If you are planning to go to a customer location where you don't have internet access, it is important to download the project prior to disconnecting.

4.3 Project Summary

The project summary panel gives you a quick view of the project information, contact information, and what incentives have been calculated up to that point in the project lifecycle. The information is available to you without having to download and open a project.

Project Summary			
ABC Lighting Upgrade			
Company:	ABC Manufacturing	Number of Rooms:	2
Phase:	Preliminary Assessment	Existing Fixtures:	135
PPN:	Jason Smith 719-258-9871 jason.smith@webmail.com	Proposed Fixtures:	135
Last Updated:	Nov 17, 2014	Project Cost:	\$7875.00
Building:	ABC Manuf. Warehouse	Total Incentive:	\$1878.82
	1334 Lake Ave	kW Savings:	8.94
	Suite 120	Annual kWh Savings:	19,314.90
	Pueblo, CO 81004	Annual Utility Bill Savings:	\$1738.34
Company POC:	Dave Romer 719-544-3988 dave.romer@mail.com	Simple Payback Period:	2.9 years
Building POC:	Dave Romer 719-544-3988 dave.romer@mail.com		

Pre-Asmt:
In-work
Submitted
Rework
Approved
As-Inst:
In-work
Submitted
Rework
Approved

Figure 7 - Project Summary

The information that is displayed in the project summary panel is updated when you change the information in the project window.

4.4 Project Status Tracker

The progress status tracker will show you where the project is in its lifecycle. Each phase is described below.

4.4.1 Preliminary Assessment: In-work



Figure 8 - Preliminary Assessment: In Work

This is the first phase of a project. When you start a new project, it will automatically be in the **Pre-Asmt: In-work** state. It is in this phase of the project that all of the initial information is supplied such as the name of the project, the company, contact information, and Preferred Partner Network (PPN) information. In this phase you will also define the energy costs that are to be used, the building address and schedules, and create and edit your list of favorite fixtures (if you haven't already done so as part of another project).

Note: Your favorite fixtures list can be edited at any time.

In the Preliminary Assessment phase, before a project is submitted, you will supply the measure information for the upgrades that are being made to the building.

4.4.2 Preliminary Assessment: Submitted



Figure 9 - Preliminary Assessment: Submitted

After you have completed your Preliminary Assessment, you will submit the project for review and approval. Once you have submitted the project, you won't be able to edit it. You can still view the project in read only mode. During the **Submitted** state, your project can either be adjusted/approved by administrators of the EnergyRight program or it can be sent back to you for rework.

4.4.3 Preliminary Assessment: Rework



Figure 10 - Preliminary Assessment: Rework

If the EnergyRight program has requested your assistance in the rework of a project, it will be shown as in the **Rework** state. The project is once again editable by you and will need to be resubmitted for approval after you have made your changes. Again, once it is submitted, you will no longer be able to make changes to the project.

4.4.4 As Installed: In-work



Figure 11 - As Installed: In-work

When the scope of work of a project in the Preliminary Assessment phase is approved, the tracker will go straight to the **As Installed: In-work** state. It is in this phase that you will supply any As Installed, updated measure information for the measures installed in the building. You'll see that the information from the approved Preliminary Assessment has been carried over to the As Installed phase. Your project will remain in the As Installed phase until you submit it for approval.

4.4.5 As Installed: Submitted



Figure 12 - As Installed: Submitted

Similar to the Preliminary Assessment phase, once you submit a project for approval you will not be able to edit the project unless it is sent back to you for rework. During the **Submitted** state, your project can either be adjusted/approved by administrators of the EnergyRight program or it can be sent back to you for rework.

4.4.6 As Installed: Rework



Figure 13 - As Installed: Rework

The **Rework** state during the As Installed phase is the same as in the Preliminary Assessment phase. When you have completed updating the information for the As Installed phase, you can resubmit the project. Once the project is submitted for approval, you will no longer be able to edit the project.

4.4.1 As Installed: Approved



Figure 14 - As Installed: Approved

Approved is the final state of a project. Once the As Installed phase has been approved, there are no additional actions to be taken in the Preferred Partner Energy Calculator. No entries in the project can be changed and all of the reports and calculations are finalized.

4.5 Project List Screen - Offline

If your computer does not have access to the Internet, the Preferred Partner Energy Calculator will be operating in offline mode. In the offline mode, you will only have access to projects that you had checked out and downloaded when previously online. When offline, certain buttons will be grayed out and non-functional indicating that feature is not available offline. You will only be able to open downloaded projects or create new projects.

5. Project Window

The project window (figure 25) is where you will enter all of your project information. It is divided up into multiple tabs for ease of navigation and follows the project lifecycle that was shown in Figure 1. All fields with a red (*) indicate that they are required. The PPEC will check to see that all of the required fields are filled out when you submit the project for approval. The following error dialog will appear indicating what required fields are still blank.

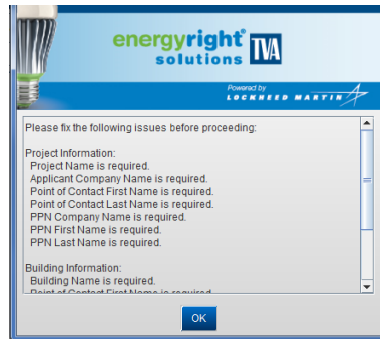


Figure 15 - Required Fields

At the top right of the project window is a “Resources Link”. Clicking on this link will open the resources window and it will show important information that you can reference for your project, including a link to the User Manual (Figure 16).

The bottom right of the window has the save and close buttons. You will be prompted to save the project if you have not previously saved it, or if you have made changes since your last save. You can also discard any changes if you don’t want to save your project.

David Gajewski 11/25/2014 4:09 PM

Comment [2]: Needs to be updated with new name and icon

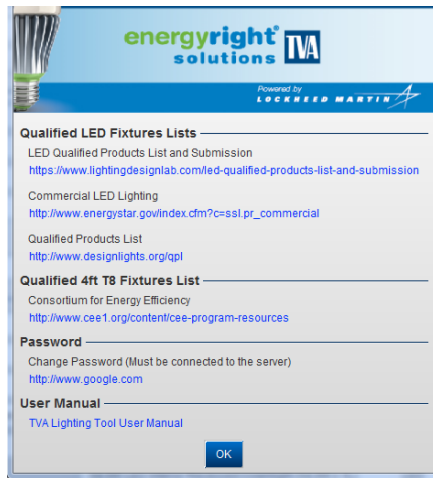


Figure 16 - Resources Window

The Project window contains 5 different tabs, each one is detailed below.

5.1 Project Information Tab

The project information tab is where you can enter all of the general project information. You will be required to enter a name for your project, name of the company, your PPN contact information, and you will be able to define your utility rate for the project. There are several pre-defined rates that you can select, but you can also enter a custom rate.

Figure 17 - Custom Rate

If you define a utility rate, the Reports Tab will contain information about annual bill savings as well as estimated payback.

5.1.1 Favorite Fixtures

Your favorite fixtures are synced with your user name. Anytime you make changes to your favorite fixtures, you'll be able to have those changes follow you from each project. You can edit your favorite fixtures list at any time by clicking the Edit Favorites button on the Project Information Tab.

When you click the Edit Favorites button, you will be taken to the Favorite Fixtures window. The window will let you quickly filter to exactly the light fixture that you're looking for and add it to your list of favorite fixtures. Your list of favorite fixtures will be available to you as you select upgrades for your project. Any fixtures to be used for a particular project will have to be added to the favorites list in order to be able to select them on the Preliminary Assessment and As Installed tabs.

The screenshot shows the 'Favorite Fixtures' window. At the top is the 'Fixture Search' section with a 'Reset Filters' button. Below it is a table with columns: Category, Fixture, Lamp, Lamp Watt, Lamp Qty, Ballast, and Factor. The table lists various light fixture options with their respective specifications. Below the search table is a table titled 'Fixture --' with columns 'Lamp Type' and 'Lamp Wattage', showing filtered results for LED fixtures. At the bottom is the 'Favorite Fixtures' section with a 'Remove' button and a table listing saved fixtures. To the right of this table is a 'Custom Fixture' section with input fields for Name, Category, and Wattage, and an 'Add to Favorites' button. At the very bottom are 'OK' and 'Cancel' buttons.

Category	Fixture	Lamp	Lamp Watt	Lamp Qty	Ballast	Factor
Fluorescent	Ceramic Metal Halide	Blax	0.5	1	CEE Dimmable Instant Start Ballast	(0.75 < BF < 0.85)
HID	Circline	Canopy	1.5	2	CEE Dimmable PS/PRS Ballast	(0.85 < BF < 0.95)
Incandescent	Cold Cathode	Exit	1.7	3	CEE Instant Start Ballast	(0.85 < BF < 1.0)
Induction	Compact	GU24	2.0	4	CEE Rapid/Program Start Ballast	(0.95 < BF < 1.10)
LED	Exterior	Highbay/Lowbay	3.0	5	CWA Ballast	(BF < 0.75)
	Halogen	Integral Screw-In	4.0	6	Efficient Instant Start Ballast	(BF < 0.85)

Fixture --	Lamp Type	Lamp Wattage
0.5W LED Interior Exit (0.5W x 1L)	LED	0.5
1.0W LED Interior Exit (0.5W x 2L)	LED	0.5
1.5W LED Interior Exit (1.5W x 1L)	LED	1.5
1.5W LED Interior Integral Screw-In (1.5W x 1L)	LED	1.5

Fixture --	Lamp Type	Lamp Wattage
110.0W Fluorescent Linear T8 CEE Highbay (32.0W x 3L x 4...)	Fluorescent	32
150.0W Incandescent Halogen Standard (150.0W x 1L)	Incandescent	150
160.0W HID Mercury Vapor Standard (160.0W x 1L) 1 CWA B...	HID	160

Figure 18 - Favorite Fixture

The top half of window is your filter so you can quickly find the light fixtures you need. To use the filter, simply click on any of the items in any of the columns. The filter will automatically hide the non-applicable values. You can also multi-select by using the "Shift" or "Ctrl" keys on your keyboard. The image below shows filtering the fixtures.

Fixture Search

[Reset Filters](#)

Category	Fixture	Lamp	Lamp Watt	Lamp Qty	Ballast	Factor
Fluorescent	Compact	GU24 Medium Base	9.0	1	Instant start Ballast Magnetic Ballast	(0.95 < BF < 1.10)

Fixture --	Lamp Type	Lamp Wattage
11.0W Fluorescent Compact Medium Base (9.0W x 1L)	Fluorescent	9
9.0W Fluorescent Compact GU24 (9.0W x 1L) 1 Instant start Ballast (0.95 < ...	Fluorescent	9
9.0W Fluorescent Compact Medium Base (9.0W x 1L) 1 Magnetic Ballast	Fluorescent	9

[Add to Favorites](#)

Figure 19 - Fixture Filter

Once you find the fixture that you want to save, simply highlight the fixture and click “Add to Favorites”. All of your favorite fixtures are displayed in the scrollable list at the bottom of the window (Figure 20). Fixtures can be added or removed from your favorite list at any time and your list will be downloaded to your computer automatically every time you log in.

Favorite Fixtures

[Remove](#)

Fixture --	Lamp Type	Lamp Wattage
110.0W Fluorescent Linear T8 CEE Highbay (32.0W x 3L x 4.0L)	Fluorescent	32
150.0W Incandescent Halogen Standard (150.0W x 1L)	Incandescent	150
160.0W HID Mercury Vapor Standard (160.0W x 1L) 1 CWA B...	HID	160
300.0W Incandescent Halogen Mogul (300.0W x 1L)	Incandescent	300

Figure 20 - Favorites List

If you have edited your favorite list while you are offline, you will be presented with a dialog to sync your favorites with those that are on the server the next time you log in. Your choices are shown in the figure below.

You have newer favorites on the server than locally. How would you like to proceed?

Overwrite server favorites with local copy	Continue using local copy
Overwrite local favorites with server copy	Add local favorites to server

Figure 21 - Syncing Your Favorites

This will enable you to have your most recent favorites where ever you are. Your favorites list contains all of the important fixtures for your projects. It is the list of favorite fixtures that are selectable when you are entering measures during the Preliminary Assessment and the As Installed phases of the project.

If you forget to add a fixture to your favorites list, you can also do it from the Preliminary Assessment and the As Installed phase tabs.

Your favorite fixture window will also give you the ability to create a custom fixture. You will be able to give your fixture a name, select a fixture incentive category and select the correct fixture wattage.

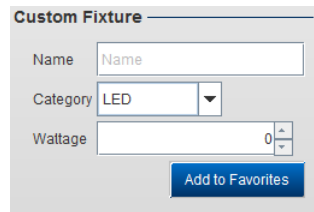
A screenshot of a web form titled "Custom Fixture". The form has three input fields: "Name" with a text box containing the placeholder "Name", "Category" with a dropdown menu showing "LED", and "Wattage" with a numeric input box showing "0" and up/down arrows. Below these fields is a blue button labeled "Add to Favorites".

Figure 22 - Custom Fixture

Note: Please ensure that your custom fixture follows the rules for your program. Information about custom fixtures and program rules can be found in the Resources link.

5.2 Building Information Tab

The Building Information Tab is where you define all important building properties. You will enter the building name, address, and also input the point of contact information for the building (Figure 23).

Project Name: Stadium Upgrade Company Name: Rich Clark Event Center LM Captures No.: [Resources](#)

Project Information **Building Information** Preliminary Assessment As Installed Reports

Building Information

Name* Rich Clark

Address 1 7639 Competition Ave

Address 2

City Pueblo

State CO

Zip Code 81005

Point of Contact Information

☒ Same as Applicant

Name* Aaron Michaels

Phone Number 719-548-8574

Email amichaels@mail.com

Fax Number (xxx)xxx-xxxx

Building Schedules

Open Delete New

Name	Weeks Per Year	Federal Holidays	Total Hours
Sundays	42		733
Weekdays	52	✓	3,649

Pre-Asmt: In-work Submitted Rework Approved As-Inst: In-work Submitted Rework Approved Save Close

Figure 23 - Building Information Tab

5.2.1 Building Schedules

You can define custom operating schedules for your building for the sake of determining the savings the customer might see on their electric bill. You will be able to quickly build any schedule for your building by clicking **New** in the Building Schedules section of the screen.

Name

Operation Weeks Per Year 0

Lights Operate on Federal Holidays ☐

Daily Operational Hours

Mon	Tue	Wed	Thu	Fri	Sat	Sun
0	0	0	0	0	0	0

Save Cancel

Figure 24 - New Schedule

You will be required to give your schedule a name, and define the number of weeks per year that it will operate, if the lights will operate on federal holidays, and the hours per day. You will be able to select from your schedules for the Preliminary Assessment and As Installed phases.

5.3 Preliminary Assessment Tab

The Preliminary Assessment Tab is where you'll enter your initial assessment for the project. As part of the Preliminary Assessment you will add rooms to your building and define the material, labor, and other associated costs. You will also select the time zone and the weather station for your area (Figure 25).

Note: The time zone and weather station are required to calculate your incentive. Your incentive calculation will read \$0 until you select a weather station and time zone.

Project Name: Stadium Upgrade Company Name: Rich Clark Event Center LM Captures No.: Resources

Project Information **Building Information** **Preliminary Assessment** **As Installed** **Reports**

Existing Fixtures: 55 Summer Peak kW Savings: 2.37 kWh Savings: 11,158.76
Proposed Fixtures: 55 Winter Peak kW Savings: 1.78 Total Incentive: \$691.85

Rich Clark Add Room Edit Favorites

Material Cost: \$5500.00 Labor Cost: \$2500.00 Other Cost: \$1500.00 Time Zone*: Eastern Weather Station*: Chattanooga

▼ Ticket Lobby Existing Fixtures: 55 Proposed Fixtures: 55 Incentive: \$691.85 Delete Room

Space Type: Small Office Building Schedule: Weekdays Add Measure

	Fixture	Control	Quantity	Operational	Notes
1 Existing	150.0W Incandescent Halogen Standard (150.0W x 1L)		20	20	Add Notes Here...
Proposed !	54.0W LED Interior Recessed Downlight (54.0W x 1L)		20		
2 Existing	W x 3L x 4.0" 1 CEE Rapid/Program Start Ballast (BF > 1.0)		35	35	Add Notes Here...
Proposed !	54.0W LED Interior Recessed Downlight (54.0W x 1L)		35		

Submit Export to PDF

Pre-Asmt: In-work Submitted Rework Approved As-Inst: In-work Submitted Rework Approved Save Close

Figure 25 - Preliminary Assessment Tab

It will also be required for you to select a space type once you have created a room. The space type determines the hours of operation that will be used to determine the incentive for the measures of that room. The space type that should be selected will be the one that best describes the building that the room is in. The schedules that you defined in the Building Information tab (Section 5.2.1) will be selectable from the drop down menu.

As mentioned in Section 5.1.1, you can edit your favorite fixtures from the Preliminary Assessment tab by clicking the **Edit Favorites** button, which opens the favorite fixtures window.

5.3.1 Adding and Deleting Rooms

When you are creating your project, you will add rooms to the building by clicking the Add Room button.

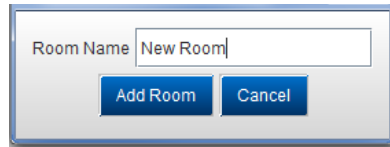
A small dialog box titled "Add Room". It contains a text input field labeled "Room Name" with the text "New Room" entered. Below the input field are two buttons: "Add Room" and "Cancel".

Figure 26 - Add Room

You will give your room a name and hit **Add Room** button. Once you do this, your new room will show up in the room frame (Figure 27). Right next to the room name is summary information about the room.

Note: Please be cautious deleting a room as this action cannot be undone.

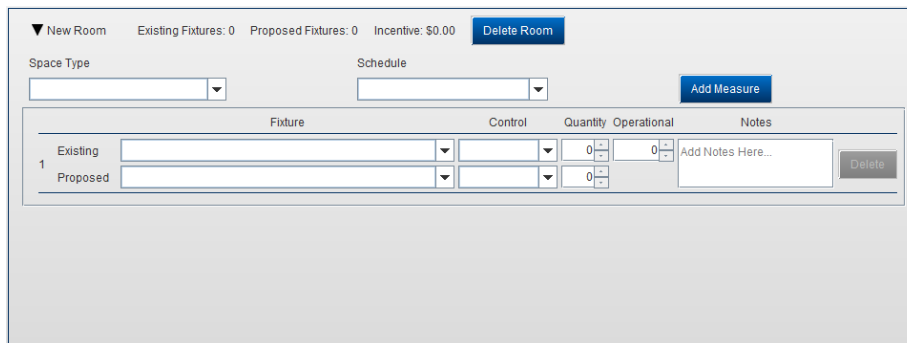
A screenshot of the "Room Frame" window. At the top, it shows a summary: "▼ New Room", "Existing Fixtures: 0", "Proposed Fixtures: 0", "Incentive: \$0.00", and a "Delete Room" button. Below this are two dropdown menus for "Space Type" and "Schedule", and an "Add Measure" button. The main area is a table with columns: "Fixture", "Control", "Quantity", "Operational", and "Notes". There are two rows: "Existing" and "Proposed". The "Existing" row has a value of "1" in the "Quantity" column and "0" in the "Operational" column. The "Proposed" row has a value of "0" in the "Quantity" column and "0" in the "Operational" column. A "Delete" button is located at the bottom right of the table.

Figure 27 - Room Frame

You can also collapse any room to help manage large projects and see a summary for all of your rooms. This is done by clicking the black triangle next to the room name (Figure 28).

► New Room

Existing Fixtures: 0

Proposed Fixtures: 0

Incentive: \$0.00

Delete Room

▼ New Room 2

Existing Fixtures: 0

Proposed Fixtures: 0

Incentive: \$0.00

Delete Room

Space Type

Schedule

Add Measure

	Fixture	Control	Quantity	Operational	Notes
Existing			0	0	Add Notes Here... <div>Delete</div>
Proposed			0		

Figure 28 - Collapsed Room List

Within the room frame there are several fields that you will need to populate with the first two being the Space Type and the room Schedule. If you need to update or add a new schedule to your list of schedules, it can be done through the Building Information Tab (Section 5.2.1).

5.3.1.1 Adding Measures

When you first add a room, it will have a blank measure listed. From the dropdown menu add the existing equipment installed and what you are proposing as upgrades. The light fixtures selectable are from your favorite fixtures list.

Note: It can be helpful to plan out the fixtures that you are going to use in the project so you can add them to your favorite fixtures list prior to starting the Preliminary Assessment.

Each time you click the Add Measure button, it will add another row for you to populate. All calculations and totals are updated dynamically and you will see a running total for your rooms and your project. The example below shows a room with multiple measures added.

Project Name: Stadium Upgrade Company Name: Rich Clark Event Center LM Captures No.: Resources

Project Information **Building Information** **Preliminary Assessment** **As Installed** **Reports**

Existing Fixtures: 78 Summer Peak kW Savings: 5.41 kWh Savings: 22,907.98
Proposed Fixtures: 78 Winter Peak kW Savings: 4.46 Total Incentive: \$874.26

Rich Clark [Add Room](#) [Edit Favorites](#)

Material Cost Labor Cost Other Cost Time Zone* Weather Station*
\$5500.00 \$2500.00 \$1500.00 Eastern Chattanooga

▼ New Room Existing Fixtures: 78 Proposed Fixtures: 78 Incentive: \$874.26 [Delete Room](#)

Space Type Schedule
Conditioned Warehouse Weekdays [Add Measure](#)

	Fixture	Control	Quantity	Operational	Notes	
1 Existing	300.0W Incandescent Halogen Mogul (300.0W x 1L)	OS	20	20	Add Notes Here...	Delete
Proposed	95.0W HID High Pressure Sodium Standard (70.0W x 1L)	OS/DC (CD)	20			
3 Existing	150.0W Incandescent Halogen Standard (150.0W x 1L)	DC (C.D.)	20	20	Add Notes Here...	Delete
Proposed	95.0W HID High Pressure Sodium Standard (70.0W x 1L)	DC (C.D.)	20			
4 Existing	W x 3L x 4.0' 1 CEE Rapid/Program Start Ballast (BF > 1.0)	OS/DC (CD)	15	15	Add Notes Here...	Delete
Proposed !	CUST - 20.0W LED (20.0W) Custom LED 20 watts	OS/DC (CD)	15			
5 Existing	V HID Mercury Vapor Standard (160.0W x 1L) 1 CWA Ballast	OS/DC (CD)	13	13	Add Notes Here...	Delete
Proposed !	54.0W LED Interior Recessed Downlight (54.0W x 1L)	OS/DC (CD)	13			

[Submit](#) [Export to PDF](#)

Pre-Asmt: Submitted Rework Approved **As-Inst:** Submitted Rework Approved [Save](#) [Close](#)

David Gajewski 11/25/2014 5:21 PM
Comment [3]: This needs to be updated with the radial toggles at the top right

Figure 29 - Multiple Measures

Note: Please be cautious when deleting a measure as this cannot be undone.

Any notes or cautions are designated by a red (!) shown next to the measure. If you hover over the exclamation mark with your mouse you can read the note or caution. Program specific information can be found in the **Resources** link at the top right.

5.3.2 Exporting Measure List to .PDF

A PDF of the scope for the purposes of sharing the extent of the project or for assistance in reconciling invoices is available. The PPEC gives you the ability to create a PDF report with a summary of the Preliminary Assessment phase and the As Installed phase. Before pressing the **Export to PDF** button, you can choose if you want to make a file with the originally submitted scope or the current/approved scope. One the **Export to PDF** button is pressed, you will be prompted to specify where you would like to save the file. You will also have the opportunity to give the report a custom name.

5.3.3 Submitting a Project for the Preliminary Assessment Phase

After you have completed the Preliminary Assessment phase, you will be able to submit the project for review and approval by a EnergyRight program approver. Once the project is submitted it will no longer be editable by the PPN. The project can still be opened as read only.

Note: The project will remain read only until it is approved or sent back for rework.

5.4 Approval Process

5.4.1 Projects Returned for Rework for the Preliminary Assessment Phase

When a project is sent for rework, the project is checked in again for the PPN to edit. The project state will be changed to Preliminary Assessment: Rework (Section 4.4.3). When a PPN receives a project for rework, they will see the items or notes added and changed by the approver. They will be able to make their changes and corrections and resubmit the project for approval.

5.4.2 Ability to See Changes Made

You have the ability to see what was originally submitted as well as the current state of each phase of a project. The toggle radio buttons are located at the top right of the screen.

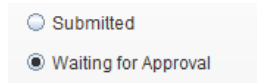


Figure 30 - Approval Toggle

Note: After a project is approved, these toggle buttons will say “Submitted” and “Approved”, you will be able to quickly switch and see the differences between what was submitted and what was approved.

Any changes that are made to a submitted project will be highlighted. This is to help distinguish between what was originally submitted and what was changed by the approver.

	Control	Quantity	Operational	Notes
	OS	14	14	Over-counted the initial number of lights.
1L)	OS/DC (CD)	14		
)	DC (C.D.)	20	20	Add Notes Here...
1L)	DC (C.D.)	20		

Figure 31 - Approver Edits

The EnergyRight program approver has the ability to edit the submitted Preliminary Assessment and then approve the project, or make changes and send the project for rework.

The EnergyRight program approver can also delete or add rooms or measures to submitted projects. If a new room is added, all of the associated fields will be highlighted (Figure 32).

▼ New Room 2 Existing Fixtures: 0 Proposed Fixtures: 0 Incentive: \$0.00 Delete Room

Space Type Schedule Add Measure

	Fixture	Control	Quantity	Operational	Notes	
Existing			0	0	Add Notes Here...	Delete
Proposed			0			

Figure 32 - Added Room

If a room is or a measure is deleted by the approver after the project is submitted, it will be highlighted and will also include hash marks indicating the room or measure has been deleted .

Proposed	95.0W HID High Pressure Sodium Standard (70.0W x 1L)	DC (C.D.)	19			
Existing	4x 95.0W 1 CEE Rapid Program Ballast (BP-5 1.0)	OS/DC (CD)	15	15	Add Notes Here...	Delete
Proposed	4x 95.0W 1 CEE Rapid Program Ballast (BP-5 1.0)	OS/DC (CD)	15			
Existing	4 HID Mercury Vapor Standard (160.0W x 1L) 1 CWA Ballast	OS/DC (CD)	13	13	Add Notes Here...	Delete

Figure 33 - Deleted Measure

Once the Preliminary Assessment is approved it is locked from any more changes. It can only be viewed as read only. At this point, the project moves into the As Installed phase. You will be able to toggle between what was originally submitted and what was ultimately approved.

Note: The very first submission of the project is saved for historic purposes even if the project was sent for rework and resubmitted.

5.4.3 Preliminary Assessment Tab in Offline Mode

In the offline mode, you will be able to edit and save your changes to the projects that you have downloaded before going offline. If you have created a new project while offline, it will not be visible to other users within your PPN company until you have checked it in while connected to the internet. You will not be able to submit a project if you are offline.

5.5 As Installed Tab

The As Installed phase can only be started after the Preliminary Assessment has been approved. If the Preliminary Assessment has not been approved you will be presented with the following screen upon navigating to the As Installed tab.

Project Name: kWh test

Company Name: LM

LM Captures No.: 0986

Resources

Project Information

Building Information

Preliminary Assessment

As Installed

Reports

The Preliminary Assessment must be approved before you can enter data for the As Installed phase.

Pre-Asmt: In-work

Submitted

Rework

Approved

As-Inst: In-work

Submitted

Rework

Approved

Save

Close

Figure 34 - As Installed Tab - Cannot Start

Once the Preliminary Assessment has been approved, the As Installed Tab can be accessed. The application will automatically copy the contents of the approved Preliminary Assessment into the As Installed tab.

The As Installed tab functions identically to the Preliminary Assessment tab. The primary difference being when you change values from the approved Preliminary Assessment values, they will be highlighted in yellow.

	Control	Quantity	Operational	Notes
ul (300.0W x 1L)	OS	14	14	Making Changes for the As Installed phase
Standard (70.0W x 1L)	OS/DC (CD)	14		
Standard (150.0W x 1L)	DC (C.D.)	19	19	Add Notes Here...
Standard (70.0W x 1L)	DC (C.D.)	19		
Start Ballast (BF > 1.0)	OS/DC (CD)	15	15	Add Notes Here...
LED 20 watts	OS/DC (CD)	15		
0W x 1L \ 1 CWA Ballast	OS/DC (CD)	13	13	Add Notes Here...

Figure 35 - As Installed Changes

© 2014 Lockheed Martin Corporation

When you have completed the As Installed phase, you will submit the project for approval just as in the Preliminary Assessment phase. All of the behavior that was seen in the Preliminary Assessment is the same in the As Installed Tab.

5.6 Report Tab

The Report tab has all of the summary information for your project. All of the calculations are updated dynamically as you update the information on the Preliminary Assessment and As Installed tabs.

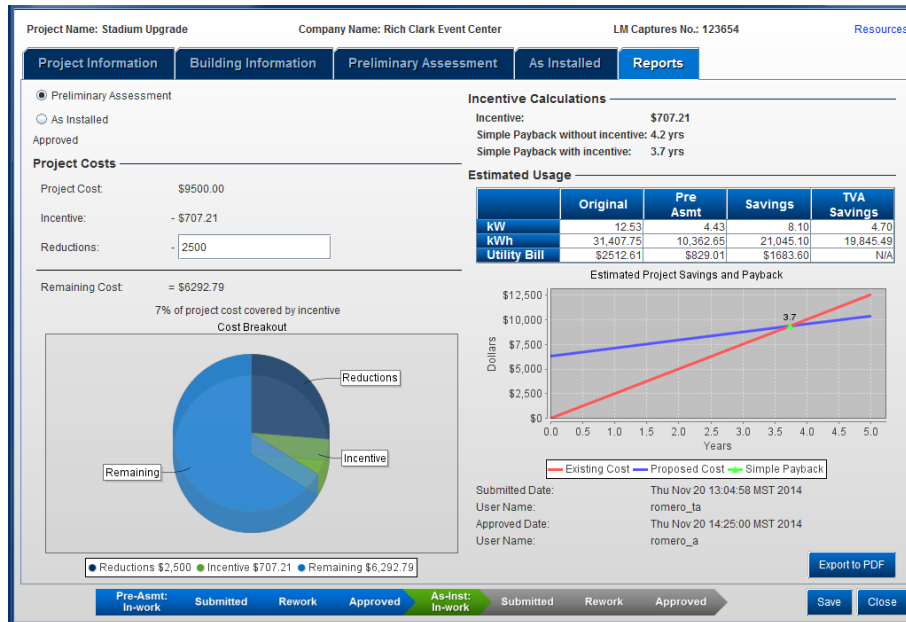


Figure 36 - Report Tab

You can quickly toggle between the different phase of your project. If you have submitted your project and it has been approved, you can switch between Preliminary Assessment and As Installed.

Note: The Report tab will show the most updated information for a project phase.

You will be able to enter any additional reductions (i.e. grants or other upfront funding sources) that may be available for your project. It will update the pie chart below and also the payoff chart on the right side of the window.

The application will also show the user name and date when the project was submitted and approved in the bottom right side of the screen.

5.6.1 Export the Report to .PDF

You can, at any time, export the report to a PDF file. You will have the opportunity to rename the file and save it to any folder on your computer. The version of the report will be based upon what you have selected in the Report Tab.

6. References

Below is a list of important websites for the PPEC.

LED Qualified Products List and Submission

<https://www.lightingdesignlab.com/led-qualified-products-list-and-submission>

Commercial LED Lighting

http://www.energystar.gov/index.cfm?c=ssl.pr_commercial

Qualified 4ft T8 Fixtures Products List

<http://www.designlights.org/qpl>

Consortium for Energy Efficiency

<http://www.cee1.org/content/cee-program-resources>